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ABSTRACT

This guide on developing an agency profile is one of 28 guides designed for organizations serving the blind and the visually handicapped who are undertaking a self-study as part of the process for accreditation by the National Accreditation Council (NAC). Instructions for preparing a packet of informative data and material for advance study by members of a site review team are provided. Profile areas described are the following: (1) statement of philosophy of service; (2) agency profile developed from documents or publications (e.g., authorizing instruments, governing authority, annual report to the public), and from tabular data (e.g., personnel utilization by vision status, staff assignment and certification, and persons served); (3) community profile, including information about the geographic area served by the agency, estimated population of the blind and visually handicapped persons in that area, and summaries of key relationships with other agencies, schools, services, and organizations; and (4) a listing of the members of the self-study coordinating committee. (JH)

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Section B-1

SELF-STUDY AND EVALUATION GUIDE | 1979 Edition

Agency Profile

NATIONAL ACCREDITATION COUNCIL
For Agencies Serving the Blind and Visually Handicapped
79 Madison Avenue
New York, N.Y. 10016

CE 019 449

U S DEPARTMENT OF HEALTH, EDUCATION & WELFARE
NATIONAL INSTITUTE OF EDUCATION

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INSTRUCTIONS

This booklet contains instructions for preparing a packet of informative data and materials as part of the complete self-study report submitted to the National Accreditation Council (NAC) for purposes of applying for accreditation or reaccreditation. The resulting packet comprises "Section B-1, Agency Profile" of the total self-study report.

The purpose of assembling this packet is to provide basic information about the agency for convenient, advance study by members of the on-site review team. Before the on-site visit, NAC sends each team member a loose-leaf workbook containing a copy of the agency profile packet along with other information and materials for advance study.

Much of the information called for in this booklet probably already is available in suitable form. Whenever possible, use of existing printed materials and charts or tables is encouraged provided they are up to date. If statistical data are regularly compiled and reported in tables or charts somewhat different from these suggested, the existing materials may be used.

It is very helpful if the packet of materials that is developed fits easily into a standard, three-ring binder. NAC uses such binders to make up the workbooks for on-site review team members. Frequently, existing materials can be "cut and pasted" to make a master copy in 8½ X 11 inch size which can be duplicated fairly easily by an office copying machine. The use of fold-out pages and inclusion of small pamphlets are satisfactory when not overly cumbersome for the reader.

A cover page should be prepared for the completed packet labeled as follows:

SECTION B-1

AGENCY PROFILE

The agency should retain the master copy of the completed packet and send three duplicates to NAC as part of the initial shipment of the complete self-study report. Later, when the number of on-site review team members has been determined, NAC will request the needed additional copies of the packet so that each team member can have one ahead of time.

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for Agencies Serving the Blind and Visually Handicapped
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SELF-STUDY AND EVALUATION GUIDES

This self-study and evaluation guide is designed to be used in combination with other guides, listed below, available from the National Accreditation Council. An organization undertaking a self-study in applying for accreditation needs to use the following. *A*, either *B-1* or *B-2*, all *C* sections, those *D* sections for the services provided, an *E* form for certain staff members and *F*.

Section	Title and Edition
A	*Manual of Procedures (1979)*
B-1	*Agency Profile (1979)*
B-2	*School Profile (1979)*
C-1	*Function and Structure (1977)*
C-2	*Accounting for Services and Finances (1976)*
C-3	*Personnel Administration and Volunteer Service (1968)*
C-4	*Physical Facilities (1975)*
C-5	*Public Relations and Fund Raising (1968)*
D-2A	*Orientation and Mobility Services (1977)*
D-2B	*Orientation and Mobility Services (Dog Guide Programs) (1968)*
D-3	*Rehabilitation Centers (1968)*
D-4	*Workshop Services (1976)*
D-5	*Social Services (1968)*
D-6	*Vocational Services (1976)*
D-7	*Production of Reading Materials (1970)*
D-8	*Rehabilitation Teaching Services (1977)*
D-15	*Preschool Services (from Birth to Six) (1979)*
D-16	*Other Service Program (1979)*
D-20	*Curriculum Planning and Evaluation (1979)*
D-21	*Program for Multihandicapped Students (1979)*
D-22	*Program for K-12 Students (1979)*
D-23	*Program for Independent Living (1979)*
D-24	*Educational Resources Program (1979)*
D-25	*Leisure Education (1979)*
D-26	*Residential Living Program (1979)*
D-27	*Health Services (1979)*
D-28	*Educational Diagnostic and Counseling Services (1979)*
E	*Individual Staff Member Information Form (1977)*
F	*Evaluation Summary and Report (1979)*

Sections *D-2A* through *D-8* are applicable primarily to "agencies" and *D-20* through *D-28* primarily to "schools." *D-15* is used for preschool services in any setting. Similarly, *D-16* is used by all organizations for services for which NAC does not have specific standards such as radio reading service or special summer program.

1977 - 1978

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ACKNOWLEDGMENTS

This *Section B-1, Agency Profile* was developed as a replacement for the 1968 *Section B, Agency Philosophy and Profile.*

In 1977-78, the self-study and evaluation guides for specialized schools for the blind and visually handicapped were totally revised. Drafts of these materials were field tested including a revised *Section B-2, School Profile.* The input obtained from the field testing of the draft of *B-2* was utilized in the preparation of this *Section B-1.* Both *B-1* and *B-2* are similar in format but differ in the nature of the information they seek.

NAC's staff, under the leadership of Dr. Richard W. Bleecker, collaborated in the revision of this section. Mr. Huesten Collingwood who served as project administrator for the education standards revision activities, carried major responsibility for general editing.

The Commission on Standards in November 1978 reviewed *Section B-1* for consistency with NAC's standards and recommended its adoption. The Commission on Accreditation similarly studied the kinds of data called for in this section for consistency with its governing Policies. In December 1978, it approved this section for use in accreditation.

It is appropriate to express appreciation to the following foundations which provided financial support to the project for revision of the self-study and evaluation guides for special schools:

The Bodman Foundation, New York, New York;
The J. M. Foundation, New York, New York;
M. D. Anderson Foundation, Houston, Texas;
The New York Community Trust, New York, New York;
Sunnen Foundation, St. Louis, Missouri.

AGENCY PROFILE

CONTENTS OF THE COMPLETED REPORT

1. STATEMENT OF PHILOSOPHY OF SERVICE

The first item in the completed packet of materials is a copy of the agency's statement of philosophy of service.

Guidelines for preparation of this statement are contained in *Section A, Manual of Procedures.*

2. AGENCY PROFILE

2.1 SCOPE

Certain available documents or publications and data regularly compiled by the agency are particularly helpful in orienting team members. Two types of materials are requested: copies of, or extracts from, documents or publications; and tabular data. Specific materials are listed below in the order in which they should be inserted after the statement of philosophy of service.

2.2 DOCUMENTS AND PUBLICATIONS

2.2.1 Different Facilities. List the name, address and services provided by each separate agency facility.

2.2.2 Authorizing Instruments. Copies of, or key extracts from, the basic legal instruments establishing the agency such as enabling legislation, judicial opinions, regulations or executive orders, the charter, articles of incorporation and bylaws.

2.2.3 Basic Eligibility Criteria. List of the basic criteria for determining eligibility for service (such as age, extent of visual impairment or feasibility for certain specified services) and their source (authorizing instruments cited above, written policy observed by the organization or unwritten practices which are followed).

2.2.4 History. A brief history of the agency.

2.2.5 Governing Authority. The list of officers and members of the agency's governing body. If the agency is a unit of a larger organizational entity and functions under a designated higher position, give the name and title of the person in that position, the position's place in the "chain of command" of the larger entity, and the name and a list of officers and members of the general advisory committee to the agency.

2.2.6 Organizational Chart. A current chart of the agency's organizational structure as officially approved by the governing authority.

2.2.7 Long Range Plan. The current long range plan.

2.2.8 Annual Plan. The agency's program and financial plan for this fiscal year.

2.2.9 Summary Financial Statements. The official or audited summary financial statements for the last fiscal year including the following or their equivalents:

2.2.9.1 Statement of Support, Revenue and Expenses and Changes in Fund Balances;

2.2.9.2 Statement of Functional Expenses; and

2.2.9.3 Balance Sheets.

(Note: if these statements are included in the latest annual report to the public as called for in item 2.2.10 below, they need not be included separately here.)

2.2.10 Annual Report to the Public. A copy of the agency's most recent annual report to the public.

2.2.11 Descriptive Brochure. A copy of the basic descriptive pamphlet(s) about the agency.

2.2.12 Follow-up Studies. Summary of findings of the most recent follow-up study of persons who have completed service or description of procedures employed to assess service effectiveness. Note the frequency with which such studies or assessments are made.

2.2.13 Wage Exemption Certificates. List of types of certificates of exemption from minimum wage and dates of expiration, if applicable (i.e., if agency provides workshop services as defined by *Section D-4, Workshop Services*).

2.2.14 Active Bargaining Units or Unions. If any employees or production workers are organized for purposes of collective bargaining, list the name of each such unit or union and the numbers and types of employees or production workers each represents.

2.3 TABULAR DATA

2.3.1 Length of Employment. Include data about the duration of employment at the agency of full time members of the administrative, professional and technical staff. (Note this information may be compiled from the "E" forms completed by full time staff. Do not include secretaries, clerks, janitors, production workers, etc.)

SAMPLE TABLE

Length of Employment of Full Time Administrative, Professional and Technical Staff

Years	Number of Persons
less than 1	____
1-3	____
4-10	____
11 and over	____
TOTAL (unduplicated count)	____

2.3.2 Turnover. Provide data on the numbers of full time administrative, professional and technical employees who were newly hired and those who terminated employment during the last fiscal year. (Do not include secretaries, clerks, janitors, production workers, etc.)

Number of "new hires" ____ Number of terminations (for all causes) ____

2.3.3 Personnel Utilization by Vision Status. Information is requested on the numbers and vision status of persons actively involved in all key aspects of the agency's operations (excluding persons served).

SAMPLE TABLE

Type of Personnel Utilization	Number of Persons: Legally Blind	Other Visually Handicapped	All Others	Total
VOLUNTEERS				
Members of Governing Body (Board of Trustees)	____	____	____	____
Members of General Advisory Committee	____	____	____	____
Members of Other Committees	____	____	____	____
Other Volunteers	____	____	____	____
STAFF				
Full Time Employees	____	____	____	____
Part Time Employees	____	____	____	____
TOTAL (unduplicated count)	____	____	____	____

2.3.4 Staff Assignments and Certification. Indicate the number of part time and full time staff according to their primary work assignments. For full time staff, indicate how many hold at least one valid certificate (license or registration) to practice the specialty corresponding to their primary work assignment. Indicate whether the staff hold state licenses, national certificates (e.g., AAWB, AEVH, NASW, NRA etc.). Count each person by only one category.

SAMPLE TABLE

Primary Work Assignment	Part Time Staff Members	Full Time Staff Members			
		Total Full Time	Certified		
			State Only	National Only	Both State & National
Administrators and Department Heads	____	____	____	____	____
Supervisors and Coordinators	____	____	____	____	____
Orientation & Mobility Specialists (peripatologists)	____	____	____	____	____
Recreation Workers	____	____	____	____	____
Rehabilitation Teachers	____	____	____	____	____
Social Workers	____	____	____	____	____
Vocational Evaluation and Work Adjustment Personnel	____	____	____	____	____
Vocational Rehabilitation Counselors	____	____	____	____	____
Workshop Staff (assistant managers, production supervisors and foremen)	____	____	____	____	____
Business Enterprises Personnel	____	____	____	____	____
Low Vision Specialists	____	____	____	____	____
Paraprofessionals or Aides	____	____	____	____	____
Secretaries, Typists and Kindred Office Workers	____	____	____	____	____
Maintenance Workers (janitors or custodians)	____	____	____	____	____
Other (specify)	____	____	____	____	____
_____	____	____	____	____	____
_____	____	____	____	____	____
_____	____	____	____	____	____
_____	____	____	____	____	____
TOTAL (unduplicated count)	____	____	____	____	____

2.3.5 Persons Served. An unduplicated count is sought of all persons served by the agency in the last fiscal year and for five years ago, by visual status.

SAMPLE TABLE

Visual Status	Persons Served	
	Last Fiscal Year (ending date):	Five Fiscal Years Ago (ending date):
Legally Blind Persons	____	____
Other Visually Handicapped Persons	____	____
All Others Receiving Service	____	____
TOTALS (unduplicated count)	____	____

2.3.6 Age Groups Served. Report the numbers of blind or visually handicapped persons served by age groups during the last fiscal year. If data are kept by another classification of age groups, utilize that system for this information.

SAMPLE TABLE

Age Groups (in years)	Persons Served	Percent
Under 5	____	____
5 - 15	____	____
16 - 19	____	____
20 - 44	____	____
45 - 64	____	____
65 - 74	____	____
75 and over	____	____
TOTAL (unduplicated count)	____	100%

2.3.7 Service Statistics. Information is requested about the numbers of persons, by vision status, who received each of the agency's various services. Services should be classified to correspond with NAC's self-study and evaluation guides (the *D* sections). Within each such service, tally a person only once during the year.

SAMPLE TABLE

Types of Services by Sections of the Self-Study Report	Persons Served in the Last Fiscal Year			
	Legally Blind	Other Visually Handicapped	All Others	Total
D-2A, Orientation and Mobility Services	____	____	____	____
D-2B, Dog Guide Program	____	____	____	____
D-3, Rehabilitation Centers	____	____	____	____
D-4, Workshop Services	____	____	____	____
D-5, Social Services	____	____	____	____
D-6, Vocational Services	____	____	____	____
D-7, Production of Reading Materials	____	____	____	____
D-8, Rehabilitation Teaching Services	____	____	____	____
D-15, Preschool Services	____	____	____	____
D-16, Other Service Program (for which NAC has no program standards: specify) *				
D-16.1, _____	____	____	____	____
D-16.2, _____	____	____	____	____
D-16.3, _____	____	____	____	____
etc.				
Other: (e.g., D-21, Program for Multihandicapped Students)	____	____	____	____

* See instructions in *Section D-16.*

2.3.8 Handicapping Conditions in Addition to Visual Impairment. Include data about additional handicapping conditions evidenced among the blind and visually handicapped persons served in the last fiscal year. Because a person may have more than one additional condition, the number of additional handicaps can exceed the number of persons. Indicate those instances when the specific conditions are suspected and when they have been diagnosed by qualified specialists.

SAMPLE TABLE

Additional Handicapping Conditions	Number of Blind and Visually Handicapped Persons Served in the Last Fiscal Year		
	Suspected	Diagnosed	Totals
Deaf-blindness	____	____	____
Other Hearing Impairments	____	____	____
Mental Retardation (severe)	____	____	____
Mental Retardation (moderate, trainable)	____	____	____
Mental Retardation (mild, educable)	____	____	____
Cerebral Palsy	____	____	____
Epilepsy	____	____	____
Diabetes	____	____	____
Orthopedic Defects	____	____	____
Behavioral Disorders	____	____	____
Other (specify)	____	____	____

3. COMMUNITY PROFILE

3.1 SCOPE

The third part of the packet of materials concerns information about the geographic area (i.e., nation, state, county, metropolitan area) served by the agency, the estimated population of blind and visually handicapped persons in that area, and summaries of key relationships maintained with other agencies, schools and other organizations and services.

3.2 AREA SERVED

Describe the geographic area served by the agency.

3.3 POPULATION DATA

3.3.1 Major Demographic Considerations. Indicate the total population of the area served by the agency. Describe any important population characteristics which have an impact on the agency. Such considerations might include the rural/urban distribution of residents, growth or decrease in number of residents, economic climate, types of work opportunities for persons served or other special characteristics of the population.

3.3.2 Estimated Number of Blind or Visually Handicapped Persons by Age Groups. If data are available according to other age groupings, they may be substituted for the following classifications.

SAMPLE TABLE

Age Groups	Legally Blind	Visually Handicapped	Totals
Under 5	____	____	____
5 - 15	____	____	____
16 - 19	____	____	____
20 - 44	____	____	____
45 - 64	____	____	____
65 - 74	____	____	____
75 and over	____	____	____

Source and date of estimates _____

_____

3.3.3 Register of Blind Persons. If a statewide or other register of blind persons is maintained or available to the agency, include the key data drawn from it.

3.4 RELATIONSHIPS WITH OTHER ORGANIZATIONAL

Identify and describe the nature of the relationships maintained with the other principal services, agencies, schools or groups which provide direct or indirect services to blind and visually handicapped children and adults within the agency's service area. Give the name and location of each organization, its chief administrator and the name and position of the person with whom the agency works most closely. Indicate the agency's key relationships with each such as: provide or purchase services on contract, serve as joint sponsor of a program, serve as a student placement setting for professional education, receive support from, etc.

3.4.1 State Vocational Rehabilitation Agency for the Blind

3.4.2 Voluntary Agencies for the Blind

3.4.3 Local Education Agencies.

3.4.4 Library for the Blind and Physically Handicapped

3.4.5 Radio Reading Service

3.4.6 Other Services Meeting Special Needs Related to Visual Impairment. List the name of the cooperating agency which provides the services specified below if they are not provided by the agency itself. (See standard 1.5.4 in *Section C-1, Function and Structure.*)

3.4.6.1 Prevention of blindness and amelioration of conditions causing visual impairment.

3.4.6.2 Low vision clinic services

3.4.6.3 Orientation and mobility services

3.4.6.4 Instruction in skills of personal and home management and communications.

3.4.7 Organizations of Blind or Other Visually Handicapped Persons. Include the names and locations of the presidents of statewide affiliates as well as local chapters in the agency's immediate community.

3.4.8 Lions, Delta Gamma and Comparable Service Clubs

3.4.9 Community Planning and Funding Bodies. Include the community or regional planning council, United Way, etc.

3.4.10 Professional Schools. Identify these schools within nearby colleges and universities which have professional schools in social work, vocational rehabilitation counseling, orientation and mobility, rehabilitation teaching, special education of the blind and visually handicapped or other fields related to work with the blind.

3.4.11 Other. Specify any other community resources with which the agency maintains important relationships.

MEMBERS OF SELF-STUDY COORDINATING COMMITTEE

The last page should identify the members of the self-study coordinating committee and the date it approved the entire packet of materials described in this section.

SUGGESTED FORMAT

Name	Identification (job title, board member, consumer, etc.)
Chairman: _____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Date this section approved by the Coordinating Committee _____

Name of agency _____

LOOK FOR THIS SYMBOL OF QUALITY SERVICE

Accreditation conveys public recognition that an organization meets nationally accepted standards for quality services for blind and visually handicapped persons, responsible management and accountability.